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# Office Furniture for Accounting & CPA Firms — Buying Guide

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## Industry Guide

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Tax season surge desks, dual-monitor setups, file-heavy storage, and client meeting rooms

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Accounting and CPA firms face a furniture challenge that is structurally unique: a headcount that effectively doubles for 12–16 weeks during tax season and then contracts, requiring a physical environment that expands and contracts gracefully without a full furnishing cycle each year. Add to this the document-intensive nature of accounting work — audit files, tax returns, and client records generate the highest volume of paper per desk of any professional services category — and the result is a furniture specification that must simultaneously handle surge capacity, maximize file storage density, support dual-monitor workstations, and present a trustworthy, professional image in client meeting rooms, all without over-capitalizing on space that sits empty from May through December.

### Staff Accountant & CPA Workstations

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Full-time staff accountants and CPAs work at high-document-volume desks year-round. Specify L-shaped desks (60"×60" minimum) that provide a primary monitor surface and a secondary review surface simultaneously. Dual-monitor configurations require minimum 30" desk depth. Include a lateral file pedestal (box/box/file) as a standard component of each workstation — not an afterthought. Sit-stand capability is increasingly standard in accounting firms as a health and retention benefit.

### Tax Season Surge Desks

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Seasonal staff brought on for 12–16 weeks of tax season need temporary workstations that can be deployed quickly and removed cleanly. Folding or nesting desks, or benching with hot-plug data and power connections, serve this purpose. Plan surge capacity at 40–60% of permanent headcount in most CPA firms. All surge workstations need their own chair — do not plan to redistribute chairs from permanent staff.

### Partner Offices

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Partner offices in CPA firms project professional authority to clients and reflect the firm's market positioning. Executive desk suites (L or U configuration, 72"+ primary surface) in quality HPL or veneer finishes, leather or leather-match executive chairs, and a small client seating area (two guest chairs, small side table) are standard. File credenzas in partner offices store active client files that partners need immediate access to during client meetings.

## File Storage

Accounting firms generate more filing volume per square foot than virtually any other professional services firm. Lateral file cabinets (36" and 42" widths) in 4- and 5-drawer configurations are the primary active file format. High-density mobile shelving reduces floor space required for record retention filing by 40–50%. Legal-size drawer compatibility is essential — many tax and audit files are in legal-size folders.

## Client Meeting Rooms

Client meeting rooms must feel trustworthy and private — clients sharing financial information need to feel the space is confidential and professionally managed. Rectangular or oval conference tables in 6'–10' lengths, leather or leather-match chairs, and soundproofed rooms (STC 45+) are appropriate specifications.

## 2. Industry-Specific Requirements

Clear-desk policies are increasingly common in CPA firms as a client data protection measure. Furniture must support clear-desk compliance: every workstation needs locking pedestal or under-desk storage large enough to contain the current active client file sets at day's end. Plan storage volume at 25–35 linear inches of file drawer per full-time staff accountant.

| Requirement                   | Specification   |
|-------------------------------|---|
| IRS / Client Confidentiality  | Client financial records must be secured — locking lateral files, shredder access from each workstation cluster, and clear-desk policy support (locking pedestals) required                   |
| ADA Accessibility             | Client-accessible areas: ADA-compliant meeting room access, accessible reception counter, 36" clear paths throughout client areas   |
| BIFMA Certification           | All seating and workstations; extended-use certification for partner-level chairs used 8–10 hours daily during peak season  |
| Document retention compliance | IRS requires 3–7 year retention periods for various tax records; furniture storage capacity must be planned around document retention schedules, not current volume                           |
| AICPA Professional Standards  | Physical security of client records is implied by AICPA confidentiality standards — locking storage at all workstations and controlled access to file rooms are standard of care requirements |

## 3. Space Planning Considerations

- Permanent staff density: 100–150 sq ft per permanent staff accountant workstation, including circulation and file storage allocation. Partner offices: 150–200 sq ft.

- **Surge capacity planning:** Tax season surge desks can be configured in a dedicated surge zone (usually a conference room or open area) rather than distributed through the permanent workspace. Plan surge density at 70–80 sq ft per temporary workstation — these positions see limited hours and can be slightly denser than permanent positions.
- **Filing room:** 1 lateral file drawer holds approximately 150 letter-size or 100 legal-size folders. A firm with 500 active client files needs approximately 5–6 filing cabinet equivalents for active files alone, plus record retention storage.
- **Client meeting rooms:** Plan 25 sq ft per seat; 4-person room: 100–120 sq ft minimum. Client rooms in accounting firms should be soundproofed (STC 45+) — financial conversations should not be audible from the hallway.
- **Reception:** If clients visit, reception seating for 4–8 people is standard. Reception desk with lowered ADA section (36" H) if walk-in clients are served.

## 4. Common Mistakes to Avoid

- **No plan for surge workstations.** Firms that try to solve tax season surge by cramming temporary staff into permanent staff areas — borrowing chairs, using break room tables — create ergonomic hazards, compliance risk, and staff morale problems. Pre-specify a surge configuration before the first busy season.
- **Undersized file storage at opening.** File volume grows with every client added and every prior year retained. Plan file storage at 150% of current volume; expand sooner than expected rather than running out of capacity during peak season.
- **No locking storage at every workstation.** Unlocked file pedestals or no pedestal at all means client financial data is left exposed at the end of the workday. This is both a data security failure and a potential AICPA standards violation.
- **Cheap client meeting room furniture.** A client sharing personal financial information in a meeting room furnished with mismatched office surplus chairs experiences subconscious doubt about the firm's attention to detail. The meeting room is a direct extension of the firm's brand quality signal.
- **Non-legal-size file drawers in a CPA firm.** Tax and audit files frequently exceed letter size. Purchasing lateral files sized only for letter format creates immediate workflow problems. Always specify lateral files with legal-size compatibility.

## 5. Budget Planning

Surge furniture ROI: Specifying quality foldable or nesting desks for surge season (\$300–\$600 each) costs 60–70% less than purchasing permanent workstations for seasonal staff who will use them for 12 weeks. The payback versus purchasing permanent surge furniture is achieved in the first tax season.

| Category                           | Budget Range  | Notes   |
|------------------------------------|---------------|---|
| Staff accountant L-desk + pedestal | \$700–\$2,000 | 60" x 60"; lockable box/box/file pedestal; commercial HPL |
| Surge/temporary workstation        | \$250–\$600   | Folding or nesting desk; deployed and stored seasonally   |

| Category                               | Budget Range    | Notes  |
|--|-----------------|--|
| Partner executive suite                | \$2,500–\$7,000 | U or L configuration; credenza; HPL or veneer                        |
| Task chair (staff)                     | \$300–\$700     | BIFMA X5.1; ergonomic; 8-hour rating                                 |
| Lateral file cabinet (5-drawer, legal) | \$450–\$1,100   | Lockable; anti-tip interlock; legal-size compatible                  |
| Client meeting table + 6 chairs        | \$1,500–\$6,000 | Oval or rectangular; leather-match chairs; cable management optional |

## 6. Recommended Products

- L-shaped desks with lockable box/box/file pedestal in 60"×60" configuration for all staff accountant positions
- Folding or nesting desks with quick-deploy legs and cable management for tax season surge configurations
- 5-drawer lateral file cabinets with legal-size compatibility, lockable bar, and anti-tip interlock
- High-density mobile shelving systems for record retention rooms — up to 50% space savings over static shelving
- Executive desk suites in U-configuration with credenza for partner offices
- Ergonomic task chairs with adjustable lumbar, 4D arms, and BIFMA X5.1 certification
- Oval conference tables in 8'–10' with leather-match conference chairs for client meeting rooms

## 7. Maintenance & Lifecycle

- File cabinet drawer slides: Apply dry lubricant to drawer slides annually. Heavily loaded legal-size lateral file drawers weigh 80–100 lb fully loaded — lubrication prevents premature slide failure.
- Surge furniture storage: Store folding and nesting surge desks in designated storage areas during off-season. Inspect folding leg mechanisms before each tax season deployment — do not discover a broken leg lock during busy season.
- Locking pedestal maintenance: Replace lock cylinders for departing staff, especially for external bookkeepers and seasonal employees. Document key control for all locking storage.
- Partner office surfaces: Veneer and HPL executive surfaces require different maintenance. Veneer: clean with slightly damp microfiber cloth; avoid standing liquid. HPL: mild commercial cleaner; avoid abrasive pads.
- Overall furniture lifecycle: Staff accountant workstations (commercial HPL): 10–12 years. Partner suites (veneer): 15–20 years with care. Surge folding desks: 10–15 years with seasonal use and proper storage.

## 8. Buyer's Checklist

- Every permanent workstation includes lockable box/box/file pedestal

- ■ Lateral files are legal-size compatible with lockable bar and anti-tip interlock
- ■ Surge desk plan in place — quantity, configuration, storage location documented
- ■ File storage capacity planned at 150% of current active file volume
- ■ Partner offices include file credenza for active client files
- ■ Client meeting rooms have soundproofing (STC 45+ recommended)
- ■ All client meeting room chairs are quality (leather or leather-match)
- ■ ADA accessible reception counter if walk-in clients are served
- ■ All task chairs BIFMA X5.1 certified with 8-hour ergonomic rating
- ■ High-density mobile shelving evaluated for record retention room

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